MS Excel 2000-2003 Personalizing Tips and Tricks

Worksheet Properties

Each worksheet records a suite of statistics about the workbook. These include such things as the file name, path, ownership, keywords, and modification timestamp. You can access these statistics through the Properties box found on the File menu. When the Properties dialog box appears there are 5 tabs: General, Summary, Statistics, Contents and Custom. The General, Statistics and Contents tabs can not be modified, while the Summary and Custom can be modified. The most often used property is the Summary tab where you can change ownership and add keywords.

Options

Under the Tools menu is an Option selection. Through this selection you can change a lot of the default settings for Excel. There are 8 tabs in Excel 2000: View, Calculation, Edit, General, Transition, Custom Lists, Chart and Color. In Excel 2003 there are these additional tabs: International, Save, Error Checking, Spelling, and Security.

View

The view options allow the user to choose which options are viewable in Excel. Typical defaults include showing the formula bar, status bar, windows taskbar, gridlines, row and column headers, sheet tabs, scroll bars (horizontal and vertical), zero value and outlines symbols. In addition, you can change the viewing style of the comments and the color of your gridlines. One that I like to turn on is the Page Breaks. This will depict where your page breaks are as you work in the file.

Calculation

Here you can change how often calculations are updated. The default is Automatic, but if your dataset is large or your computer slow this might make things cumbersome. You can change the calculations to manual and let the file recalculate everything before saving, or whenever you press F9. In this section you may also switch to the 1904 date system if desired.

Edit

These options allow changes to how the data is edited in the worksheet. Most of these will not be changed by the user but some useful ones are:

Move selection after enter:
By default this is set to down, but you can change it to any other direction as well.

Fixed decimal places:
This will set the number of decimal places to always display by default for any numeric field.

General

In this section you can change the default file locations (this is where files are saved or the folder where excel starts to look for a file), and how the spreadsheet appears: font style and size, number of worksheets, number of recently files used.

Transition

This is where you can change the default file type for saving the files. This was setup to make things comparable to Lotus 1-2-3, and is not often used now.

Custom Lists

This tab is where all custom lists are stored. By default there are lists for the days of the week and months in both an abbreviated format and the full name. You can create new lists in this box through either typing in the values or selecting them from a range in a worksheet. If you are typing the values in just hit enter after each new entry for the list. When you have completed the list, click Add.

Chart
Chart options are available for only the active chart selected at the time. It allows the user to decide how to handle empty cells: not plotted, zero value or interpolated.

Color
This allows the user to change the default colors set in the drop down boxes for fills. Note that these changes will not carry over to another user's excel, but will instead substitute back the original color

Error Checking
Excel 2003 started adding error checking while working in a spreadsheet. The error checking generally looks for numbers stored as text, 2 digit year dates and formula problems. These are displayed in the worksheet by a little green triangle in the upper left hand side of the cell. You turn on and off many of these options. If you frequently have data that is numeric but stored as date, this is a good option to turn off.

Customize Options
The Customize dialog box can be opened through the Tools menu, Customize option. This allows the user to change the toolbars (see toolbar section) as well as some other options. Here you can increase the icon size, allow only recent commands to show, and set menu animations.

Toolbars
Toolbars are a collection of buttons or icons that are used to perform some common task in Excel. Anchored toolbars appear just below the menu and just above the ruler, while floating toolbars appear almost anywhere on your screen. Toolbars are completely customizable. You can change which toolbars are visible, where they are located, and what buttons are available on the toolbars. Any time you wish to customize a toolbar you need to be in the customize mode. Here you can change what toolbars are available, add buttons to toolbars, change button images, styles and text, create new buttons and assign macros to buttons.

Customize toolbar mode
There are two methods to customize toolbars: View Menu, Toolbars, Customize…. or right-click on any toolbar and select Customize. Both methods open the Customize dialog box.

Viewable Toolbars
When you right-click on a toolbar you see a context menu that lists all available toolbars. Those with checkmarks next them are the ones currently being displayed. To display a toolbar simply click that toolbar in the context menu.

Change the location of a toolbar
Toolbars can either be anchored or floating. Most of your main toolbars are anchored in place. You can anchor toolbars in any of the four edges of the window. Floating toolbars just sit on top

of the window in any location. An example of a common floating toolbar is the picture toolbar. It does not appear until you click on an image to adjust and then it floats on the screen. To make any floating toolbar anchored, just click and drag it to one of the edge of the window. It will then be anchored there and always visible (although not always enabled).

Adding a button
Buttons can be added to any toolbar.   In the Customize dialog box go to the Commands tab. From this tab you can click and drag any button up to any toolbar.

Removing a button
Make sure you are in the Customize toolbar mode (see above). Select the button you wish to remove, and drag it off of the toolbar. This button will no longer appear on the toolbar. Be careful that you do not just drag it to another toolbar.

Change button style
Each button has 4 styles: Default (image only), Text Only (always), Text Only (in Menus), and Image and Text. To save space, choose the Default (image only) option. These options can be chosen by right-clicking on any icon image when you are customizing the toolbar. On the context menu choose the appropriate style.

Change button image
Icon images can be changed when you are customizing a toolbar by right-clicking on that icon. When you right-click context menu appears. From this menu select the Change Button Image choice. A variety of pre-defined images appear. You may choose from any of these. If you wish to create your own image, select instead the Edit Button Image button. This opens the button editor where you can change the color of the squares to make an image.

Custom Buttons
Custom buttons are those that do not have a pre-defined action to them. Instead you can assign a macro to these buttons.

> **To create a custom button:**
> 1. View menu, Toolbars, Customize…
> 2. Commands tab
> 3. Categories: Macros
> 4. Commands: Custom Button
> 5. Click and drag the Custom Button icon up to a toolbar. This places the button on that toolbar and it is now available to be used.
> 6. Currently that button does not have a macro assigned to it and has a default picture of a smiley face.
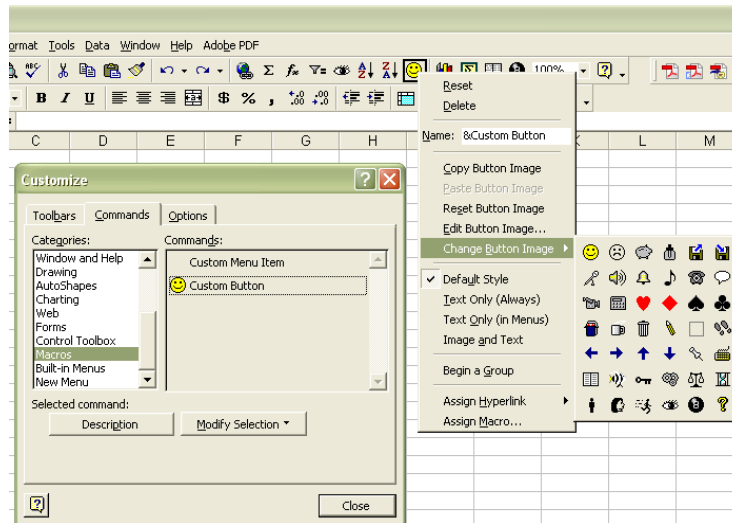
Assign a macro to a button
After the button has been added to the toolbar, right-click on the button to engage the context menu. From this menu you can select "Assign Macro…" which opens the Macro dialog box. This box lists all the available macros. Select the correct one and click Ok. This macro is now assigned to that button.

Create a customized toolbar
You can create customize toolbars that suit your needs. In the Customize mode, you want the Toolbars tab to be selected. Click New to open the Toolbar dialog box. Name your toolbar and click Ok. Notice that your new toolbar appears at the bottom of the screen and is checked. Also note that a blank floating toolbar now appears. Click on the Commands tab of the dialog box. Click and drag the buttons you wish to use to your new toolbar. You may then anchor your toolbar in place if you wish. To delete a customized toolbar (you cannot delete built-in toolbars), in Customize mode, under the toolbars tab, select your customized toolbar. Click delete, and it erases that toolbar (you cannot get it back). If you simply do not want to display the toolbar unclick it from the visible toolbars.

Macros

Macro Security Excel 2003 only
In the Excel 2003, macro security was added to the program. The security was added to prevent malicious macros from infecting the computer or destroying data. The default security levels are generally set higher than needed for our purposes here, but these levels may be changed.

To change the macro security level
1. Under the Tools menu, select Macro, Security…
2. On the Security Level tab, select an appropriate security level.
3. In general the Low or Medium levels are appropriate for the work done here.

Simple Macros
Macros can be created to remember a series of tasks that you might repeatedly use in Excel. The information for the macro is stored in as Visual Basic code, but you do not need to know code in order to create simply macros. The easiest way to create simple macros is to use the

macro recorder. When recording you must have all the steps pre-planned, for any misstep will be recorded as well as the steps you desire.

Recording a macro
1. Tools menu, Macro, Record New Macro…
2. In the dialog box name the macro, add a shortcut key (optional), and decide where the macro is stored (this workbook or Personal Macro Workbook). Macro names must start with letter and contain no spaces. Be careful if you add a shortcut key that it does not already exist. Any shortcut key you add for a macro will overwrite any default or existing shortcut keys. If you store it in the Personal macro workbook, then it will be available in every instance of Excel on your machine when you are signed on. You may also enter a description of the macro if so desired.
3. Click Ok
4. Go through the steps you want recorded.
5. When done, click Stop Recording on the floating toolbar.

Viewing a macro
You can view any macro you created in Visual Basic Editor Window. To view macros in this window, on the Tools menu select Macro, Macros. In the dialog box select the name of the macro you wish to view and click Edit. The editor window will open.

Run a Macro
You can run a macro from the macro list or you can create a button and add the macro to that button (see above). To run the macro from the list, simply select Macro, Macros, from the Tools menu. In the dialog box select the macro you wish to run and click Run. In this window you can always add a shortcut key to any existing macro.